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## France

## Oilseeds and Products

## Oilseeds Update

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### Report Highlights:

In 2002, French oilseed production totaled 4.99 million MT, up from 4.77 million MT in 2001, mainly due to higher rapeseed yields. Production included 3.29 million MT rapeseed, 1.51 million MT sunflowerseed, and 191,000 MT soybeans. In 2001/02, French consumption of soybean meals increased by 7 percent, soybean meals replacing meat and bone meals banned in animal feed rations. As a result, soybean imports, crush and imports of meals increased significantly. In MY 2001/02, Brazilian soybeans remained the market leader with a 48 percent share, but the market share of U.S. soybeans increased to 38 percent.

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## Executive Summary

In 2002, French oilseed production totaled 4.99 million MT, up from 4.77 million MT in 2001, mainly due to higher rapeseed yields. Production included 3.29 million MT rapeseed, 1.51 million MT sunflowerseed, and 191,000 MT soybeans. In 2001/02, French consumption of soybean meals increased by 7 percent, soybean meals replacing meat and bone meals banned in animal feed rations. As a result, soybean imports, crush and imports of meals increased significantly. In MY 2001/02, Brazilian soybeans remained the market leader with a 48 percent share, but the market share of U.S. soybeans increased to 38 percent.

## Section I: Statistical Tables

### 1. Seeds

PSD Table						
Country	France					
Commodity	Oilseed, Rapeseed				(1000 HA)(1000 MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Area Planted	1225	1225	1096	1083	1063	1044
Area Harvested	1225	1225	1096	1083	1040	1044
Beginning Stocks	85	83	121	121	61	131
Production	3569	3569	2890	2874	3250	3209
MY Imports	29	28	30	28	30	15
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	15	15	15	13	15	10
TOTAL SUPPLY	3683	3680	3041	3023	3341	3355
MY Exports	1831	1828	1450	1355	1650	1616
MY Exp. to the EC	1506	1506	1210	1201	1400	1300
Crush Dom. Consumption	1288	1288	1300	1268	1381	1400
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cn.	443	443	230	269	250	196
TOTAL Dom. Consumption	1731	1731	1530	1537	1631	1596
Ending Stocks	121	121	61	131	60	143
TOTAL DISTRIBUTION	3683	3680	3041	3023	3341	3355
Calendar Year Imports	30	30	30	30	30	20
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	1817	1405	1450	1300	1650	1300
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, French Customs, SCEES

PSD Table						
Country	France					
Commodity	Oilseed, Sunflowerseed				(1000 HA)(1000 MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Area Planted	710	710	710	706	650	637
Area Harvested	710	710	709	706	630	637
Beginning Stocks	301	342	292	312	104	52
Production	1813	1813	1579	1581	1500	1508
MY Imports	178	178	51	43	50	142
MY Imp. from U.S.	1	1	1	1	1	1
MY Imp. from the EC	10	10	6	10	5	5
TOTAL SUPPLY	2292	2333	1922	1936	1654	1702
MY Exports	450	450	475	487	450	310
MY Exp. to the EC	425	425	450	462	450	300
Crush Dom. Consumption	1379	1379	1175	1201	1050	1150
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cn.	171	192	168	196	100	171
TOTAL Dom. Consumption	1550	1571	1343	1397	1150	1321
Ending Stocks	292	312	104	52	54	71
TOTAL DISTRIBUTION	2292	2333	1922	1936	1654	1702
Calendar Year Imports	117	117	50	200	50	150
Calendar Yr Imp. U.S.	1	1	1	1	1	1
Calendar Year Exports	556	547	480	600	450	500
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, French Customs, SCEES

PSD Table						
Country	France					
Commodity	Oilseed, Soybean				(1000 HA)(1000 MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		10/2000		10/2001		10/2002
Area Planted	79	79	119	121	80	75
Area Harvested	79	79	119	121	80	75
Beginning Stocks	51	51	228	182	217	212
Production	207	207	291	311	210	191
MY Imports	899	899	900	950	900	970
MY Imp. from U.S.	240	240	260	365	260	380
MY Imp. from the EC	111	111	110	110	110	120
TOTAL SUPPLY	1157	1157	1419	1443	1327	1373
MY Exports	5	5	5	13	5	5
MY Exp. to the EC	3	3	3	10	3	3
Crush Dom. Consumption	543	543	800	788	760	800
Food Use Dom. Consump.	97	120	97	120	97	120
Feed,Seed,Waste Dm.Cn.	284	307	300	310	280	275
TOTAL Dom. Consumption	924	970	1197	1218	1137	1195
Ending Stocks	228	182	217	212	185	173
TOTAL DISTRIBUTION	1157	1157	1419	1443	1327	1373
Calendar Year Imports	964	970	900	1000	900	1000
Calendar Yr Imp. U.S.	305	305	260	365	260	350
Calendar Year Exports	5	6	5	11	5	5
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, French Customs, SCEES

## 2. Meals

PSD Table						
Country	France					
Commodity	Meal, Rapeseed				(1000 MT)(PERCENT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Crush	1288	1288	1300	1268	1381	1400
Extr. Rate, 999.9999	0.561335	0.561335	0.561538	0.52918	0.561188	0.542857
Beginning Stocks	36	34	28	28	38	39
Production	723	723	730	671	775	760
MY Imports	293	292	320	324	300	250
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	287	285	310	314	310	240
TOTAL SUPPLY	1052	1049	1078	1023	1113	1049
MY Exports	57	57	65	49	65	55
MY Exp. to the EC	55	55	60	40	60	50
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	967	964	975	935	1000	960
TOTAL Dom. Consumption	967	964	975	935	1000	960
Ending Stocks	28	28	38	39	48	34
TOTAL DISTRIBUTION	1052	1049	1078	1023	1113	1049
Calendar Year Imports	313	307	320	280	300	300
Calendar Yr Imp. U.S.	0	3	0	0	0	0
Calendar Year Exports	47	47	60	50	65	50
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, French Customs, SGFHTF

PSD Table						
Country	France					
Commodity	Meal, Sunflowerseed				(1000 MT)(PERCENT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Crush	1379	1379	1175	1201	1050	1150
Extr. Rate, 999.9999	0.544598	0.544598	0.544681	0.543714	0.542857	0.53913
Beginning Stocks	33	19	51	37	34	32
Production	751	751	640	653	570	620
MY Imports	278	278	300	189	300	250
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	85	84	85	64	100	50
TOTAL SUPPLY	1062	1048	991	879	904	902
MY Exports	114	114	90	79	80	80
MY Exp. to the EC	110	110	80	75	70	75
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	897	897	867	768	800	790
TOTAL Dom. Consumption	897	897	867	768	800	790
Ending Stocks	51	37	34	32	24	32
TOTAL DISTRIBUTION	1062	1048	991	879	904	902
Calendar Year Imports	181	181	300	300	300	250
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	106	106	90	90	80	80
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, French Customs, SGFHTF

PSD Table						
Country	France					
Commodity	Meal, Soybean				(1000 MT)(PERCENT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		10/2000		10/2001		10/2002
Crush	543	543	800	788	760	800
Extr. Rate, 999.9999	0.782689	0.782689	0.78125	0.793147	0.782895	0.7875
Beginning Stocks	7	7	9	9	10	5
Production	425	425	625	625	595	630
MY Imports	4416	4416	4610	4550	4695	4500
MY Imp. from U.S.	38	38	40	40	40	40
MY Imp. from the EC	510	510	550	500	550	500
TOTAL SUPPLY	4848	4848	5244	5184	5300	5135
MY Exports	91	91	100	100	100	100
MY Exp. to the EC	29	29	30	30	30	30
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	4748	4748	5134	5079	5190	5030
TOTAL Dom. Consumption	4748	4748	5134	5079	5190	5030
Ending Stocks	9	9	10	5	10	5
TOTAL DISTRIBUTION	4848	4848	5244	5184	5300	5135
Calendar Year Imports	4415	4415	4600	4600	4700	4600
Calendar Yr Imp. U.S.	38	38	40	40	40	40
Calendar Year Exports	105	105	100	100	100	100
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, French Customs, SGFHTF

### 3. Oils

PSD Table						
Country	France					
Commodity	Oil, Rapeseed				(1000 MT)(PERCENT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Crush	1288	1288	1300	1268	1381	1400
Extr. Rate, 999.9999	0.415373	0.438665	0.415385	0.47082	0.416365	0.457143
Beginning Stocks	23	23	21	21	21	25
Production	535	565	540	597	575	640
MY Imports	201	201	180	110	180	100
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	201	201	180	110	180	100
TOTAL SUPPLY	759	789	741	728	776	765
MY Exports	198	198	220	73	240	100
MY Exp. to the EC	164	164	190	64	220	80
Industrial Dom. Consum	372	372	309	380	300	380
Food Use Dom. Consump.	153	183	167	235	185	235
Feed Waste Dom. Consum	15	15	24	15	31	15
TOTAL Dom. Consumption	540	570	500	630	516	630
Ending Stocks	21	21	21	25	20	35
TOTAL DISTRIBUTION	759	789	741	728	776	765
Calendar Year Imports	213	213	180	180	180	180
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	161	161	200	200	200	200
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: French Customs, SGFHTF

PSD Table						
Country	France					
Commodity	Oil, Sunflowerseed				(1000 MT)(PERCENT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Crush	1379	1379	1175	1201	1050	1150
Extr. Rate, 999.9999	0.420595	0.455402	0.417021	0.456286	0.419048	0.46087
Beginning Stocks	87	87	58	58	38	63
Production	580	628	490	548	440	530
MY Imports	138	138	150	161	165	180
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	112	112	120	100	128	150
TOTAL SUPPLY	805	853	698	767	643	773
MY Exports	301	301	280	238	250	220
MY Exp. to the EC	236	236	220	223	200	200
Industrial Dom. Consum	66	66	46	60	46	60
Food Use Dom. Consump.	380	428	334	406	310	425
Feed Waste Dom. Consum	0	0	0	0	0	0
TOTAL Dom. Consumption	446	494	380	466	356	485
Ending Stocks	58	58	38	63	37	68
TOTAL DISTRIBUTION	805	853	698	767	643	773
Calendar Year Imports	133	133	150	150	165	150
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	287	287	280	280	280	280
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: French Customs, SGFHTF

PSD Table						
Country	France					
Commodity	Oil, Soybean				(1000 MT)(PERCENT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		10/2000		10/2001		10/2002
Crush	543	543	800	788	760	800
Extr. Rate, 999.9999	0.180479	0.21547	0.18	0.205584	0.180263	0.2125
Beginning Stocks	9	9	9	9	19	9
Production	98	117	144	162	137	170
MY Imports	59	59	50	50	50	55
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	59	59	20	50	20	55
TOTAL SUPPLY	166	185	203	221	206	234
MY Exports	57	57	65	90	75	75
MY Exp. to the EC	4	4	4	10	5	5
Industrial Dom. Consum	32	32	49	40	41	41
Food Use Dom. Consump.	38	57	30	48	30	74
Feed Waste Dom. Consum	30	30	40	34	41	35
TOTAL Dom. Consumption	100	119	119	122	112	150
Ending Stocks	9	9	19	9	19	9
TOTAL DISTRIBUTION	166	185	203	221	206	234
Calendar Year Imports	59	59	50	50	50	50
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	60	60	65	65	65	65
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: French Customs, SGFHTF

## Section II: Narrative on Production, Supply and Demand

### 1. Seeds

#### Rapeseed:

French rapeseed production for 2002 was revised down slightly from previous estimate to 3.2 million MT, according to the most recent estimates published by the French oilseeds board (ONIOL). This makes French rapeseed production for 2002 an 11.6 percent over the 2001 figure. The overall increase is due to improved yields, from 2.65 MT/ha in 2001 to 3.07 MT/ha in 2002. Oddly enough this yields were so good they overcame a small drop in acreage.

As a result to this increase in production, both exports and crush consumption are expected to increase in MY 2002/03, as indicated in the PS&D.

Although there will be no planting estimates published until December for rapeseed planted in 2002 to be harvested in 2003, rapeseed acreage is likely to have increased from the previous year.

#### Sunflowerseed:

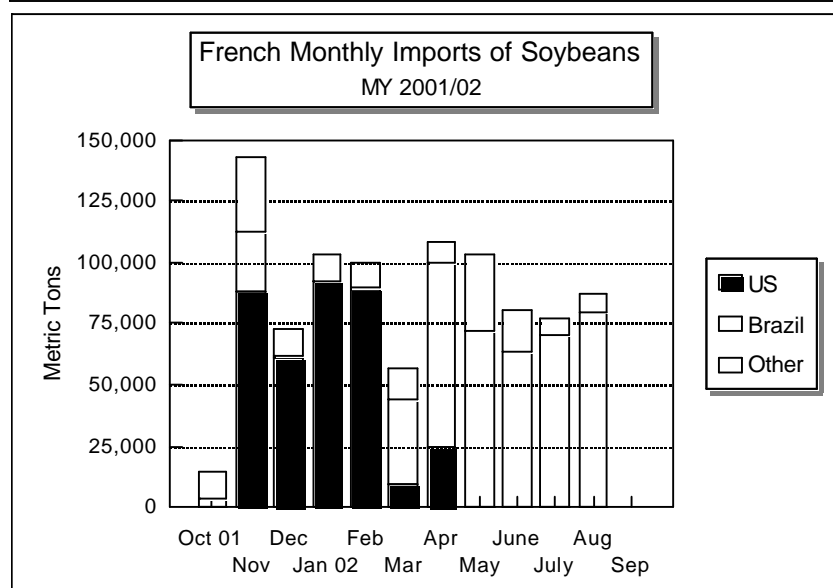
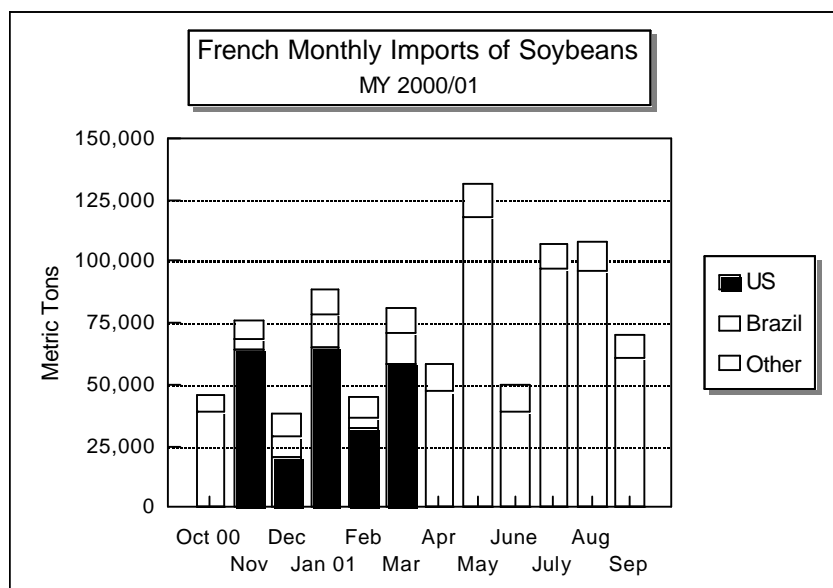
The latest sunflowerseed production estimates for 2002 confirm previous estimates of 1.5 million MT. Higher yields boosted production, but acreage declined significantly, resulting in a 5 percent decline in production from 2001. Yields rose from 2.24 MT/ha in 2001 to 2.37 MT/ha in 2002.

In MY 2002/03, the reduction in production is expected to result in lower exports and lower crush consumption of sunflowerseed, as indicated in the PS&D.

#### Soybeans:

In 2002, French soybean acreage and production declined by 38 percent to 75,000 ha and 191,000 MT, respectively. This resulted mainly from reduced payments for non-GM ("Soja de Pays") soybeans. Also, in MY 2002/03, imports are expected to increase, due to the high domestic demand for soybean meals in animal feed. Crush consumption is also expected to increase in MY 2002/03.

As indicated in the graphs below, U.S. exports of soybeans to France increased significantly in MY 2001/02 from MY 2000/01. The most recent data available are for July 2002. During the first 11 months of MY 2001/02, French imports of soybeans from the United States totaled 365,000 MT (38 percent market share), up from 240,000 MT (30 percent market share) during the same period of MY 2000/01. At the same time, French imports of soybeans from Brazil declined from 424,000 MT (48 percent) from 479,000 MT (58 percent). Despite this increase in U.S. market share, Brazil remains France's leading supplier, a position it has held since 1998/99 (except in 1999/00), previously France's number one supplier was the United States.



## 2. Meals

French consumption of soybean meals (on its way up since a ban on meat and bone meal in animal feed) increased by 7 percent from 4.75 million MT in MY 2000/01 to 5.08 million MT in 2001/02. As a result, both soybean crush and soybean meal imports increased significantly. Consequently, sunflower meal consumption declined, together with sun meal imports and sunflower seed crush. French imports of sunflowerseed meal were revised significantly down from last report, including lower imports from Argentina.

## 3. Oils

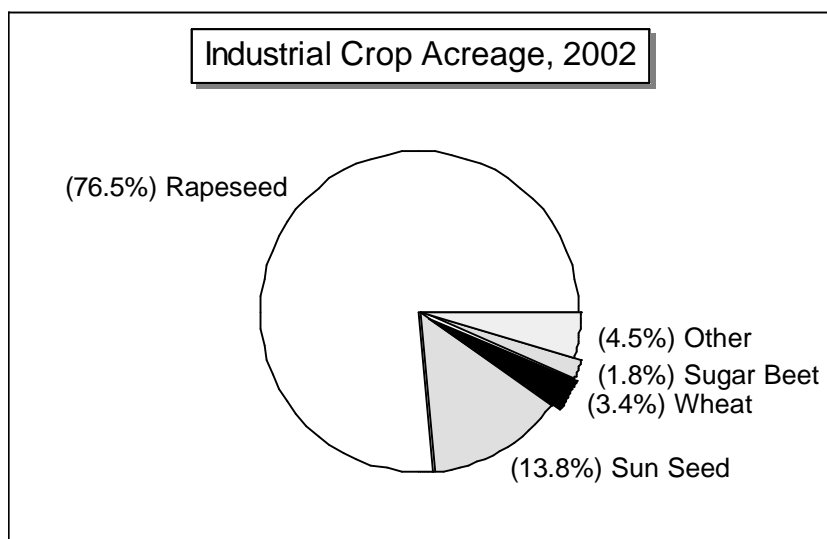
Oil production data are confidential in France. Production of rape oil, sun oil and soy oil were revised in the PS&D tables according to revised oil extraction rates, based on the meal extraction rates. As a result, food use domestic consumption data (which are also confidential) were revised to balance the PS&D tables.

### Rapeseed Oil:

The major revision in the rapeseed oil PS&D is the sharp drop in French exports from 198,000 MT in MY 2000/01 to 73,000 MT MY 2001/02. This resulted from a number of factors, including lower price-competitiveness of rapeseed oil, reduced German demand as a result of a higher rapeseed harvest and crush in Germany, and lower Italian demand. A significant amount of rapeseed oil was exported from France to Italy, where it was processed into bio-diesel, and reexported to Germany, which has a special tax cut program for biofuels. However, in 2002, the German bio-diesel production capacity increased significantly, therefore limiting the German demand for biodiesel.

## 4. Industrial Crops

Industrial oilseeds are mainly grown in France to produce bio-diesel. Oilseeds are the major industrial crops grown in France. As indicated in the graph below, wheat and sugarbeet are also grown to produce bio-ethanol, but on a smaller scale.



Industrial rapeseed and sunflowerseed production continues to account for a significant part of total production. Data in the table below were revised according to recent estimates published by ONIOL:

		2000/01		2001/02		2002/03	
		Area (1,000 ha)	Production (1,000 MT)	Area (1,000 ha)	Production (1,000 MT)	Area (1,000 ha)	Production (1,000 MT)
Rapeseed	Industrial	311	895	281	773	284	895
	Food/Feed	914	2,674	802	2,101	760	2,398
	Total	1,225	3,569	1,083	2,874	1,044	3,293
Sunflower seeds	Industrial	66	159	50	106	51	121
	Food/Feed	644	1,654	656	1,475	586	1,387
	Total	710	1,813	706	1,581	637	1,508
Soybeans	Food/Feed	79	207	121	311	75	191
Total Oilseeds	Industrial	377	1,054	331	879	335	1,016
	Food/Feed	1,637	4,535	1,579	3,887	1,421	3,976
	Total	2,014	5,589	1,910	4,766	1,756	4,992